

Global Porous Ceramic Chucks Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Porous Ceramic Chucks market size is expected to reach \$ 351 million by 2032, rising at a market growth of 8.9% CAGR during the forecast period (2026-2032).

Porous ceramic chucks are highly uniform vacuum workholding platforms used in semiconductor, display, optoelectronic, and precision manufacturing applications. Their core value lies in replacing drilled-hole or grooved suction surfaces with an interconnected microporous structure, allowing negative pressure to be distributed more evenly across wafers, films, glass, and other fragile flat workpieces. This reduces local indentation, edge stress, scratching, and warpage risk, while improving positional stability for ultrathin substrates during thinning, dicing, grinding, polishing, cleaning, inspection, handling, thermo-compression bonding, and coating processes. Official product pages show that these products are commonly built around porous alumina, silicon carbide, or silica ceramics, and can be integrated with metal bases, cooling grooves, heating and cooling modules, selective vacuum circuits, or air-floating structures. Product customization typically centers on pore size, porosity, flatness, parallelism, airflow uniformity, heat resistance, corrosion resistance, and wear resistance. Compared with conventional vacuum chucks and electrostatic chucks, porous ceramic chucks place greater emphasis on damage-free holding of thin and brittle workpieces, long-term dimensional stability, and cross-process adaptability. They serve not only silicon, sapphire, and gallium arsenide wafers, but also panel glass, PET films, optical samples, and certain battery and biomedical flat materials. Commercial offerings include standard chucks, partial-adsorption chucks, extra-large platforms, and thermal chuck modules, as well as custom replacements, refurbished parts, and integrated components designed for specific equipment models and process windows. Based on disclosed applications, competition in this market is shifting from standalone adsorption performance toward broader optimization of material systems, thermal

management, large-format capability, multi-zone control, and equipment compatibility.

Porous ceramic chucks are, in essence, small but critical process-interface components in semiconductor and precision manufacturing equipment. They are far less visible than complete tools, yet they directly determine whether fragile workpieces such as thin wafers, films, and glass can be held in a stable, uniform, and low-damage manner throughout high-precision processes. Official product pages show that competition has clearly moved beyond the basic question of whether a part can be held at all. Instead, vendors compete on microporous structure design, material systems, base integration, thermal management, selective vacuum control, flatness, parallelism, airflow uniformity, and long-term durability. For customers, what is really being purchased is not simply a ceramic plate, but a process solution that matches a specific equipment model, process window, and yield target. This is why similar products often need to be customized according to wafer size, substrate type, temperature conditions, vacuum zoning, and takt-time requirements. Once introduced into a production line, these parts directly affect scratching, warpage, breakage rate, and equipment uptime, so customer qualification cycles are usually long and replacement costs are not low. As a result, although this niche is smaller than the overall equipment market, it has strong technical barriers, high qualification thresholds, and deep customer stickiness. Once a supplier enters a mainstream tool platform or production line, it can often generate stable revenue from spare parts, refurbishment, upgrades, and secondary development. From ASUZAC, NTK CERATEC, and YOSHIOKA SEIKO to CoorsTek, ARC Nano, and Semixicon, vendors consistently emphasize compatibility across different processes, sizes, and workpiece surfaces, showing that the market has already shifted from a standard-part logic to a compound competition built on materials, structure, and process know-how. Companies that can simultaneously optimize ceramic properties, pore distribution, bonding strength, and final machining precision are more likely to enter high-value customer lists.

On the demand side, porous ceramic chucks are benefiting from two major growth tracks at the same time. The first is the continued upgrading of conventional semiconductor manufacturing, especially in back-end and process-transition steps such as wafer thinning, dicing, grinding, polishing, cleaning, inspection, and handling, where damage control requirements for thin and brittle workpieces continue to rise. As wafers become thinner, materials more fragile, and substrates larger, traditional drilled-hole suction and other approaches with more concentrated local force are increasingly unable to balance holding stability with surface protection. This steadily amplifies the value of porous ceramic solutions. The second growth track comes from advanced

packaging, heterogeneous integration, AI chips, and high-performance computing, all of which are creating new substrate-handling requirements, including wafer-level thermo-compression bonding, large-format substrate adsorption, ultrathin material transfer, and stable fixation under elevated temperatures. At the same time, display panels, optical samples, PET films, laser processing, and some new-energy battery processes are expanding the product's horizontal application boundaries. In other words, while semiconductors remain the core demand engine, the growth logic of this market is not driven by a single industry cycle. Rather, it is supported by multiple precision-manufacturing scenarios that are jointly increasing demand for uniform adsorption, damage-free clamping, and platform-level integration capability. This is not merely a conceptual broadening. Official pages already explicitly show applications involving silicon wafers, sapphire, gallium arsenide, glass, films, and panels, indicating that end-market demand is extending from single wafer handling into a broader class of fragile flat-material processing. That implies stronger demand resilience than that of a component tied to only one process step. When combined with capacity expansion in advanced packaging and upgrades in back-end equipment, the demand elasticity of this category over the next several years remains favorable.

From a competitive and regional perspective, Japanese suppliers still maintain strong advantages in high-end porous ceramics, bonding processes, stability control, and precision products. Companies in mainland China, South Korea, and Taiwan are accelerating their catch-up in customization speed, tool matching, cost efficiency, and localized service, while U.S. suppliers are more focused on specialized custom solutions and research-oriented applications. Over the next few years, the industry is likely to evolve along three major paths. First, material systems will diversify beyond alumina toward silicon carbide, silica, and composite systems in order to address high-temperature environments, anti-static requirements, laser processing, ultrathin workpieces, and more complex process conditions. Second, products will move beyond standalone chucks toward thermal chucks, air-floating platforms, multi-zone control, partial adsorption designs, and extra-large platforms, making these components increasingly resemble modular subsystems. Third, as global semiconductor capacity expansion, advanced-packaging investment, and localized supply-chain development continue, vendors that can combine materials capability, precision machining, equipment adaptation, and process co-development will be best positioned to capture higher value-added and longer-lifecycle orders. With the United States, Japan, China, and other regions continuing to invest in semiconductor manufacturing and advanced-packaging infrastructure, porous ceramic chucks, as critical interface components, appear more likely to follow a structural upward trajectory than a short-term thematic cycle. This also means that future winners may not simply be the companies with the

strongest standalone material performance, but those that can co-develop with equipment makers, process engineers, and end-user production lines while systematizing delivery, qualification, and after-sales support. As customers place increasing weight on supply continuity and localized response, a combination of regional manufacturing and global delivery is also likely to become an important competitive characteristic of the industry.

This report studies the global Porous Ceramic Chucks production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Porous Ceramic Chucks and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Porous Ceramic Chucks that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Porous Ceramic Chucks total production and demand, 2021-2032, (K Units)

Global Porous Ceramic Chucks total production value, 2021-2032, (USD Million)

Global Porous Ceramic Chucks production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Porous Ceramic Chucks consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Porous Ceramic Chucks domestic production, consumption, key domestic manufacturers and share

Global Porous Ceramic Chucks production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Porous Ceramic Chucks production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Porous Ceramic Chucks production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Porous Ceramic Chucks market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include ASUZAC, Semixicon, ARC Nano, CoorsTek Inc, Kyocera, NTK CERATEC CO., LTD., YOSHIOKA SEIKO Inc., Krosaki Harima Corporation, Nishimura Advanced Ceramics Co.,Ltd, HYLUX Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Porous Ceramic Chucks market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Porous Ceramic Chucks Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Porous Ceramic Chucks Market, Segmentation by Type:

Al₂O₃ Chucks

AlN Chucks

SiC Chucks

Global Porous Ceramic Chucks Market, Segmentation by Adsorption Scope:

Full Surface Adsorption

Partial Adsorption

Global Porous Ceramic Chucks Market, Segmentation by Thermal Control Capability:

Ambient Type

Thermal Control Type

Global Porous Ceramic Chucks Market, Segmentation by Application:

Vacuum Chucks

Porous Ceramic Suction Stage

Porous Ceramic Suction Pads

Companies Profiled:

ASUZAC

Semixicon

ARC Nano

CoorsTek Inc

Kyocera

NTK CERATEC CO., LTD.

YOSHIOKA SEIKO Inc.

Krosaki Harima Corporation

Nishimura Advanced Ceramics Co.,Ltd

HYLUX Co., Ltd.

TRI-N Co., Ltd.

Fine Ceramic New Material Co.,Ltd.

Xiamen Innovacera Advanced Materials Co., Ltd.

Dongguan XY New Material Co., Ltd.

Semicera Semiconductor Technology Co., Ltd.

KINIK COMPANY

Touch-Down Technology Co., Ltd.

LONGYI PRECISION TECHNOLOGY CO., LTD.

MACTECH CORPORATION

PhotoMachining, Inc.

FOUNTYL TECHNOLOGIES PTE. LTD.

Key Questions Answered:

1. How big is the global Porous Ceramic Chucks market?
2. What is the demand of the global Porous Ceramic Chucks market?
3. What is the year over year growth of the global Porous Ceramic Chucks market?
4. What is the production and production value of the global Porous Ceramic Chucks market?
5. Who are the key producers in the global Porous Ceramic Chucks market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Porous Ceramic Chucks Introduction
- 1.2 World Porous Ceramic Chucks Supply & Forecast
 - 1.2.1 World Porous Ceramic Chucks Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Porous Ceramic Chucks Production (2021-2032)
 - 1.2.3 World Porous Ceramic Chucks Pricing Trends (2021-2032)
- 1.3 World Porous Ceramic Chucks Production by Region (Based on Production Site)
 - 1.3.1 World Porous Ceramic Chucks Production Value by Region (2021-2032)
 - 1.3.2 World Porous Ceramic Chucks Production by Region (2021-2032)
 - 1.3.3 World Porous Ceramic Chucks Average Price by Region (2021-2032)
 - 1.3.4 North America Porous Ceramic Chucks Production (2021-2032)
 - 1.3.5 Europe Porous Ceramic Chucks Production (2021-2032)
 - 1.3.6 China Porous Ceramic Chucks Production (2021-2032)
 - 1.3.7 Japan Porous Ceramic Chucks Production (2021-2032)
 - 1.3.8 South Korea Porous Ceramic Chucks Production (2021-2032)
 - 1.3.9 China Taiwan Porous Ceramic Chucks Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Porous Ceramic Chucks Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Porous Ceramic Chucks Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Porous Ceramic Chucks Demand (2021-2032)
- 2.2 World Porous Ceramic Chucks Consumption by Region
 - 2.2.1 World Porous Ceramic Chucks Consumption by Region (2021-2026)
 - 2.2.2 World Porous Ceramic Chucks Consumption Forecast by Region (2027-2032)
- 2.3 United States Porous Ceramic Chucks Consumption (2021-2032)
- 2.4 China Porous Ceramic Chucks Consumption (2021-2032)
- 2.5 Europe Porous Ceramic Chucks Consumption (2021-2032)
- 2.6 Japan Porous Ceramic Chucks Consumption (2021-2032)
- 2.7 South Korea Porous Ceramic Chucks Consumption (2021-2032)
- 2.8 ASEAN Porous Ceramic Chucks Consumption (2021-2032)
- 2.9 India Porous Ceramic Chucks Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Porous Ceramic Chucks Production Value by Manufacturer (2021-2026)
- 3.2 World Porous Ceramic Chucks Production by Manufacturer (2021-2026)
- 3.3 World Porous Ceramic Chucks Average Price by Manufacturer (2021-2026)
- 3.4 Porous Ceramic Chucks Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Porous Ceramic Chucks Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Porous Ceramic Chucks in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Porous Ceramic Chucks in 2025
- 3.6 Porous Ceramic Chucks Market: Overall Company Footprint Analysis
 - 3.6.1 Porous Ceramic Chucks Market: Region Footprint
 - 3.6.2 Porous Ceramic Chucks Market: Company Product Type Footprint
 - 3.6.3 Porous Ceramic Chucks Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Porous Ceramic Chucks Production Value Comparison
 - 4.1.1 United States VS China: Porous Ceramic Chucks Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Porous Ceramic Chucks Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Porous Ceramic Chucks Production Comparison
 - 4.2.1 United States VS China: Porous Ceramic Chucks Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Porous Ceramic Chucks Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Porous Ceramic Chucks Consumption Comparison
 - 4.3.1 United States VS China: Porous Ceramic Chucks Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Porous Ceramic Chucks Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Porous Ceramic Chucks Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Porous Ceramic Chucks Production Value (2021-2026)

4.4.3 United States Based Manufacturers Porous Ceramic Chucks Production (2021-2026)

4.5 China Based Porous Ceramic Chucks Manufacturers and Market Share

4.5.1 China Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Porous Ceramic Chucks Production Value (2021-2026)

4.5.3 China Based Manufacturers Porous Ceramic Chucks Production (2021-2026)

4.6 Rest of World Based Porous Ceramic Chucks Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Porous Ceramic Chucks Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Porous Ceramic Chucks Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Porous Ceramic Chucks Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Al₂O₃ Chucks

5.2.2 AlN Chucks

5.2.3 SiC Chucks

5.3 Market Segment by Type

5.3.1 World Porous Ceramic Chucks Production by Type (2021-2032)

5.3.2 World Porous Ceramic Chucks Production Value by Type (2021-2032)

5.3.3 World Porous Ceramic Chucks Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY ADSORPTION SCOPE

6.1 World Porous Ceramic Chucks Market Size Overview by Adsorption Scope: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Adsorption Scope

6.2.1 Full Surface Adsorption

6.2.2 Partial Adsorption

6.3 Market Segment by Adsorption Scope

6.3.1 World Porous Ceramic Chucks Production by Adsorption Scope (2021-2032)

6.3.2 World Porous Ceramic Chucks Production Value by Adsorption Scope (2021-2032)

6.3.3 World Porous Ceramic Chucks Average Price by Adsorption Scope (2021-2032)

7 MARKET ANALYSIS BY THERMAL CONTROL CAPABILITY

7.1 World Porous Ceramic Chucks Market Size Overview by Thermal Control Capability: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Thermal Control Capability

7.2.1 Ambient Type

7.2.2 Thermal Control Type

7.3 Market Segment by Thermal Control Capability

7.3.1 World Porous Ceramic Chucks Production by Thermal Control Capability (2021-2032)

7.3.2 World Porous Ceramic Chucks Production Value by Thermal Control Capability (2021-2032)

7.3.3 World Porous Ceramic Chucks Average Price by Thermal Control Capability (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Porous Ceramic Chucks Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Vacuum Chucks

8.2.2 Porous Ceramic Suction Stage

8.2.3 Porous Ceramic Suction Pads

8.3 Market Segment by Application

8.3.1 World Porous Ceramic Chucks Production by Application (2021-2032)

8.3.2 World Porous Ceramic Chucks Production Value by Application (2021-2032)

8.3.3 World Porous Ceramic Chucks Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 ASUZAC

- 9.1.1 ASUZAC Details
- 9.1.2 ASUZAC Major Business
- 9.1.3 ASUZAC Porous Ceramic Chucks Product and Services
- 9.1.4 ASUZAC Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.1.5 ASUZAC Recent Developments/Updates
- 9.1.6 ASUZAC Competitive Strengths & Weaknesses
- 9.2 Semixicon
 - 9.2.1 Semixicon Details
 - 9.2.2 Semixicon Major Business
 - 9.2.3 Semixicon Porous Ceramic Chucks Product and Services
 - 9.2.4 Semixicon Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Semixicon Recent Developments/Updates
 - 9.2.6 Semixicon Competitive Strengths & Weaknesses
- 9.3 ARC Nano
 - 9.3.1 ARC Nano Details
 - 9.3.2 ARC Nano Major Business
 - 9.3.3 ARC Nano Porous Ceramic Chucks Product and Services
 - 9.3.4 ARC Nano Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 ARC Nano Recent Developments/Updates
 - 9.3.6 ARC Nano Competitive Strengths & Weaknesses
- 9.4 CoorsTek Inc
 - 9.4.1 CoorsTek Inc Details
 - 9.4.2 CoorsTek Inc Major Business
 - 9.4.3 CoorsTek Inc Porous Ceramic Chucks Product and Services
 - 9.4.4 CoorsTek Inc Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 CoorsTek Inc Recent Developments/Updates
 - 9.4.6 CoorsTek Inc Competitive Strengths & Weaknesses
- 9.5 Kyocera
 - 9.5.1 Kyocera Details
 - 9.5.2 Kyocera Major Business
 - 9.5.3 Kyocera Porous Ceramic Chucks Product and Services
 - 9.5.4 Kyocera Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Kyocera Recent Developments/Updates
 - 9.5.6 Kyocera Competitive Strengths & Weaknesses

9.6 NTK CERATEC CO., LTD.

9.6.1 NTK CERATEC CO., LTD. Details

9.6.2 NTK CERATEC CO., LTD. Major Business

9.6.3 NTK CERATEC CO., LTD. Porous Ceramic Chucks Product and Services

9.6.4 NTK CERATEC CO., LTD. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 NTK CERATEC CO., LTD. Recent Developments/Updates

9.6.6 NTK CERATEC CO., LTD. Competitive Strengths & Weaknesses

9.7 YOSHIOKA SEIKO Inc.

9.7.1 YOSHIOKA SEIKO Inc. Details

9.7.2 YOSHIOKA SEIKO Inc. Major Business

9.7.3 YOSHIOKA SEIKO Inc. Porous Ceramic Chucks Product and Services

9.7.4 YOSHIOKA SEIKO Inc. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 YOSHIOKA SEIKO Inc. Recent Developments/Updates

9.7.6 YOSHIOKA SEIKO Inc. Competitive Strengths & Weaknesses

9.8 Krosaki Harima Corporation

9.8.1 Krosaki Harima Corporation Details

9.8.2 Krosaki Harima Corporation Major Business

9.8.3 Krosaki Harima Corporation Porous Ceramic Chucks Product and Services

9.8.4 Krosaki Harima Corporation Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Krosaki Harima Corporation Recent Developments/Updates

9.8.6 Krosaki Harima Corporation Competitive Strengths & Weaknesses

9.9 Nishimura Advanced Ceramics Co.,Ltd

9.9.1 Nishimura Advanced Ceramics Co.,Ltd Details

9.9.2 Nishimura Advanced Ceramics Co.,Ltd Major Business

9.9.3 Nishimura Advanced Ceramics Co.,Ltd Porous Ceramic Chucks Product and Services

9.9.4 Nishimura Advanced Ceramics Co.,Ltd Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Nishimura Advanced Ceramics Co.,Ltd Recent Developments/Updates

9.9.6 Nishimura Advanced Ceramics Co.,Ltd Competitive Strengths & Weaknesses

9.10 HYLUX Co., Ltd.

9.10.1 HYLUX Co., Ltd. Details

9.10.2 HYLUX Co., Ltd. Major Business

9.10.3 HYLUX Co., Ltd. Porous Ceramic Chucks Product and Services

9.10.4 HYLUX Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.10.5 HYLUX Co., Ltd. Recent Developments/Updates
- 9.10.6 HYLUX Co., Ltd. Competitive Strengths & Weaknesses
- 9.11 TRI-N Co., Ltd.
 - 9.11.1 TRI-N Co., Ltd. Details
 - 9.11.2 TRI-N Co., Ltd. Major Business
 - 9.11.3 TRI-N Co., Ltd. Porous Ceramic Chucks Product and Services
 - 9.11.4 TRI-N Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 TRI-N Co., Ltd. Recent Developments/Updates
 - 9.11.6 TRI-N Co., Ltd. Competitive Strengths & Weaknesses
- 9.12 Fine Ceramic New Material Co.,Ltd.
 - 9.12.1 Fine Ceramic New Material Co.,Ltd. Details
 - 9.12.2 Fine Ceramic New Material Co.,Ltd. Major Business
 - 9.12.3 Fine Ceramic New Material Co.,Ltd. Porous Ceramic Chucks Product and Services
 - 9.12.4 Fine Ceramic New Material Co.,Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Fine Ceramic New Material Co.,Ltd. Recent Developments/Updates
 - 9.12.6 Fine Ceramic New Material Co.,Ltd. Competitive Strengths & Weaknesses
- 9.13 Xiamen Innovacera Advanced Materials Co., Ltd.
 - 9.13.1 Xiamen Innovacera Advanced Materials Co., Ltd. Details
 - 9.13.2 Xiamen Innovacera Advanced Materials Co., Ltd. Major Business
 - 9.13.3 Xiamen Innovacera Advanced Materials Co., Ltd. Porous Ceramic Chucks Product and Services
 - 9.13.4 Xiamen Innovacera Advanced Materials Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Xiamen Innovacera Advanced Materials Co., Ltd. Recent Developments/Updates
 - 9.13.6 Xiamen Innovacera Advanced Materials Co., Ltd. Competitive Strengths & Weaknesses
- 9.14 Dongguan XY New Material Co., Ltd.
 - 9.14.1 Dongguan XY New Material Co., Ltd. Details
 - 9.14.2 Dongguan XY New Material Co., Ltd. Major Business
 - 9.14.3 Dongguan XY New Material Co., Ltd. Porous Ceramic Chucks Product and Services
 - 9.14.4 Dongguan XY New Material Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Dongguan XY New Material Co., Ltd. Recent Developments/Updates
 - 9.14.6 Dongguan XY New Material Co., Ltd. Competitive Strengths & Weaknesses

9.15 Semicera Semiconductor Technology Co., Ltd.

9.15.1 Semicera Semiconductor Technology Co., Ltd. Details

9.15.2 Semicera Semiconductor Technology Co., Ltd. Major Business

9.15.3 Semicera Semiconductor Technology Co., Ltd. Porous Ceramic Chucks Product and Services

9.15.4 Semicera Semiconductor Technology Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Semicera Semiconductor Technology Co., Ltd. Recent Developments/Updates

9.15.6 Semicera Semiconductor Technology Co., Ltd. Competitive Strengths & Weaknesses

9.16 KINIK COMPANY

9.16.1 KINIK COMPANY Details

9.16.2 KINIK COMPANY Major Business

9.16.3 KINIK COMPANY Porous Ceramic Chucks Product and Services

9.16.4 KINIK COMPANY Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.16.5 KINIK COMPANY Recent Developments/Updates

9.16.6 KINIK COMPANY Competitive Strengths & Weaknesses

9.17 Touch-Down Technology Co., Ltd.

9.17.1 Touch-Down Technology Co., Ltd. Details

9.17.2 Touch-Down Technology Co., Ltd. Major Business

9.17.3 Touch-Down Technology Co., Ltd. Porous Ceramic Chucks Product and Services

9.17.4 Touch-Down Technology Co., Ltd. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Touch-Down Technology Co., Ltd. Recent Developments/Updates

9.17.6 Touch-Down Technology Co., Ltd. Competitive Strengths & Weaknesses

9.18 LONGYI PRECISION TECHNOLOGY CO., LTD.

9.18.1 LONGYI PRECISION TECHNOLOGY CO., LTD. Details

9.18.2 LONGYI PRECISION TECHNOLOGY CO., LTD. Major Business

9.18.3 LONGYI PRECISION TECHNOLOGY CO., LTD. Porous Ceramic Chucks Product and Services

9.18.4 LONGYI PRECISION TECHNOLOGY CO., LTD. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 LONGYI PRECISION TECHNOLOGY CO., LTD. Recent Developments/Updates

9.18.6 LONGYI PRECISION TECHNOLOGY CO., LTD. Competitive Strengths & Weaknesses

9.19 MACTECH CORPORATION

- 9.19.1 MACTECH CORPORATION Details
- 9.19.2 MACTECH CORPORATION Major Business
- 9.19.3 MACTECH CORPORATION Porous Ceramic Chucks Product and Services
- 9.19.4 MACTECH CORPORATION Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.19.5 MACTECH CORPORATION Recent Developments/Updates
- 9.19.6 MACTECH CORPORATION Competitive Strengths & Weaknesses
- 9.20 PhotoMachining, Inc.
 - 9.20.1 PhotoMachining, Inc. Details
 - 9.20.2 PhotoMachining, Inc. Major Business
 - 9.20.3 PhotoMachining, Inc. Porous Ceramic Chucks Product and Services
 - 9.20.4 PhotoMachining, Inc. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.20.5 PhotoMachining, Inc. Recent Developments/Updates
 - 9.20.6 PhotoMachining, Inc. Competitive Strengths & Weaknesses
- 9.21 FOUNTYL TECHNOLOGIES PTE. LTD.
 - 9.21.1 FOUNTYL TECHNOLOGIES PTE. LTD. Details
 - 9.21.2 FOUNTYL TECHNOLOGIES PTE. LTD. Major Business
 - 9.21.3 FOUNTYL TECHNOLOGIES PTE. LTD. Porous Ceramic Chucks Product and Services
 - 9.21.4 FOUNTYL TECHNOLOGIES PTE. LTD. Porous Ceramic Chucks Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.21.5 FOUNTYL TECHNOLOGIES PTE. LTD. Recent Developments/Updates
 - 9.21.6 FOUNTYL TECHNOLOGIES PTE. LTD. Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Porous Ceramic Chucks Industry Chain
- 10.2 Porous Ceramic Chucks Upstream Analysis
 - 10.2.1 Porous Ceramic Chucks Core Raw Materials
 - 10.2.2 Main Manufacturers of Porous Ceramic Chucks Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Porous Ceramic Chucks Production Mode
- 10.6 Porous Ceramic Chucks Procurement Model
- 10.7 Porous Ceramic Chucks Industry Sales Model and Sales Channels
 - 10.7.1 Porous Ceramic Chucks Sales Model
 - 10.7.2 Porous Ceramic Chucks Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Porous Ceramic Chucks Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Porous Ceramic Chucks Production Value by Region (2021-2026) & (USD Million)

Table 3. World Porous Ceramic Chucks Production Value by Region (2027-2032) & (USD Million)

Table 4. World Porous Ceramic Chucks Production Value Market Share by Region (2021-2026)

Table 5. World Porous Ceramic Chucks Production Value Market Share by Region (2027-2032)

Table 6. World Porous Ceramic Chucks Production by Region (2021-2026) & (K Units)

Table 7. World Porous Ceramic Chucks Production by Region (2027-2032) & (K Units)

Table 8. World Porous Ceramic Chucks Production Market Share by Region (2021-2026)

Table 9. World Porous Ceramic Chucks Production Market Share by Region (2027-2032)

Table 10. World Porous Ceramic Chucks Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Porous Ceramic Chucks Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Porous Ceramic Chucks Major Market Trends

Table 13. World Porous Ceramic Chucks Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Porous Ceramic Chucks Consumption by Region (2021-2026) & (K Units)

Table 15. World Porous Ceramic Chucks Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Porous Ceramic Chucks Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Porous Ceramic Chucks Producers in 2025

Table 18. World Porous Ceramic Chucks Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Porous Ceramic Chucks Producers in 2025

Table 20. World Porous Ceramic Chucks Average Price by Manufacturer (2021-2026) &

(US\$/Unit)

Table 21. Global Porous Ceramic Chucks Company Evaluation Quadrant

Table 22. World Porous Ceramic Chucks Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Porous Ceramic Chucks Production Site of Key Manufacturer

Table 24. Porous Ceramic Chucks Market: Company Product Type Footprint

Table 25. Porous Ceramic Chucks Market: Company Product Application Footprint

Table 26. Porous Ceramic Chucks Competitive Factors

Table 27. Porous Ceramic Chucks New Entrant and Capacity Expansion Plans

Table 28. Porous Ceramic Chucks Mergers & Acquisitions Activity

Table 29. United States VS China Porous Ceramic Chucks Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Porous Ceramic Chucks Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Porous Ceramic Chucks Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Porous Ceramic Chucks Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Porous Ceramic Chucks Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Porous Ceramic Chucks Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Porous Ceramic Chucks Production Market Share (2021-2026)

Table 37. China Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Porous Ceramic Chucks Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Porous Ceramic Chucks Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Porous Ceramic Chucks Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Porous Ceramic Chucks Production Market Share (2021-2026)

Table 42. Rest of World Based Porous Ceramic Chucks Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Porous Ceramic Chucks Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Porous Ceramic Chucks Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Porous Ceramic Chucks Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Porous Ceramic Chucks Production Market Share (2021-2026)

Table 47. World Porous Ceramic Chucks Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Porous Ceramic Chucks Production by Type (2021-2026) & (K Units)

Table 49. World Porous Ceramic Chucks Production by Type (2027-2032) & (K Units)

Table 50. World Porous Ceramic Chucks Production Value by Type (2021-2026) & (USD Million)

Table 51. World Porous Ceramic Chucks Production Value by Type (2027-2032) & (USD Million)

Table 52. World Porous Ceramic Chucks Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Porous Ceramic Chucks Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Porous Ceramic Chucks Production Value by Adsorption Scope, (USD Million), 2021 & 2025 & 2032

Table 55. World Porous Ceramic Chucks Production by Adsorption Scope (2021-2026) & (K Units)

Table 56. World Porous Ceramic Chucks Production by Adsorption Scope (2027-2032) & (K Units)

Table 57. World Porous Ceramic Chucks Production Value by Adsorption Scope (2021-2026) & (USD Million)

Table 58. World Porous Ceramic Chucks Production Value by Adsorption Scope (2027-2032) & (USD Million)

Table 59. World Porous Ceramic Chucks Average Price by Adsorption Scope (2021-2026) & (US\$/Unit)

Table 60. World Porous Ceramic Chucks Average Price by Adsorption Scope (2027-2032) & (US\$/Unit)

Table 61. World Porous Ceramic Chucks Production Value by Thermal Control Capability, (USD Million), 2021 & 2025 & 2032

Table 62. World Porous Ceramic Chucks Production by Thermal Control Capability (2021-2026) & (K Units)

Table 63. World Porous Ceramic Chucks Production by Thermal Control Capability

(2027-2032) & (K Units)

Table 64. World Porous Ceramic Chucks Production Value by Thermal Control Capability (2021-2026) & (USD Million)

Table 65. World Porous Ceramic Chucks Production Value by Thermal Control Capability (2027-2032) & (USD Million)

Table 66. World Porous Ceramic Chucks Average Price by Thermal Control Capability (2021-2026) & (US\$/Unit)

Table 67. World Porous Ceramic Chucks Average Price by Thermal Control Capability (2027-2032) & (US\$/Unit)

Table 68. World Porous Ceramic Chucks Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Porous Ceramic Chucks Production by Application (2021-2026) & (K Units)

Table 70. World Porous Ceramic Chucks Production by Application (2027-2032) & (K Units)

Table 71. World Porous Ceramic Chucks Production Value by Application (2021-2026) & (USD Million)

Table 72. World Porous Ceramic Chucks Production Value by Application (2027-2032) & (USD Million)

Table 73. World Porous Ceramic Chucks Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Porous Ceramic Chucks Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. ASUZAC Basic Information, Manufacturing Base and Competitors

Table 76. ASUZAC Major Business

Table 77. ASUZAC Porous Ceramic Chucks Product and Services

Table 78. ASUZAC Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. ASUZAC Recent Developments/Updates

Table 80. ASUZAC Competitive Strengths & Weaknesses

Table 81. Semixicon Basic Information, Manufacturing Base and Competitors

Table 82. Semixicon Major Business

Table 83. Semixicon Porous Ceramic Chucks Product and Services

Table 84. Semixicon Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Semixicon Recent Developments/Updates

Table 86. Semixicon Competitive Strengths & Weaknesses

Table 87. ARC Nano Basic Information, Manufacturing Base and Competitors

Table 88. ARC Nano Major Business

Table 89. ARC Nano Porous Ceramic Chucks Product and Services

Table 90. ARC Nano Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. ARC Nano Recent Developments/Updates

Table 92. ARC Nano Competitive Strengths & Weaknesses

Table 93. CoorsTek Inc Basic Information, Manufacturing Base and Competitors

Table 94. CoorsTek Inc Major Business

Table 95. CoorsTek Inc Porous Ceramic Chucks Product and Services

Table 96. CoorsTek Inc Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. CoorsTek Inc Recent Developments/Updates

Table 98. CoorsTek Inc Competitive Strengths & Weaknesses

Table 99. Kyocera Basic Information, Manufacturing Base and Competitors

Table 100. Kyocera Major Business

Table 101. Kyocera Porous Ceramic Chucks Product and Services

Table 102. Kyocera Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Kyocera Recent Developments/Updates

Table 104. Kyocera Competitive Strengths & Weaknesses

Table 105. NTK CERATEC CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 106. NTK CERATEC CO., LTD. Major Business

Table 107. NTK CERATEC CO., LTD. Porous Ceramic Chucks Product and Services

Table 108. NTK CERATEC CO., LTD. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. NTK CERATEC CO., LTD. Recent Developments/Updates

Table 110. NTK CERATEC CO., LTD. Competitive Strengths & Weaknesses

Table 111. YOSHIOKA SEIKO Inc. Basic Information, Manufacturing Base and Competitors

Table 112. YOSHIOKA SEIKO Inc. Major Business

Table 113. YOSHIOKA SEIKO Inc. Porous Ceramic Chucks Product and Services

Table 114. YOSHIOKA SEIKO Inc. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. YOSHIOKA SEIKO Inc. Recent Developments/Updates

Table 116. YOSHIOKA SEIKO Inc. Competitive Strengths & Weaknesses

Table 117. Krosaki Harima Corporation Basic Information, Manufacturing Base and Competitors

Table 118. Krosaki Harima Corporation Major Business

Table 119. Krosaki Harima Corporation Porous Ceramic Chucks Product and Services

Table 120. Krosaki Harima Corporation Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Krosaki Harima Corporation Recent Developments/Updates

Table 122. Krosaki Harima Corporation Competitive Strengths & Weaknesses

Table 123. Nishimura Advanced Ceramics Co.,Ltd Basic Information, Manufacturing Base and Competitors

Table 124. Nishimura Advanced Ceramics Co.,Ltd Major Business

Table 125. Nishimura Advanced Ceramics Co.,Ltd Porous Ceramic Chucks Product and Services

Table 126. Nishimura Advanced Ceramics Co.,Ltd Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Nishimura Advanced Ceramics Co.,Ltd Recent Developments/Updates

Table 128. Nishimura Advanced Ceramics Co.,Ltd Competitive Strengths & Weaknesses

Table 129. HYLUX Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 130. HYLUX Co., Ltd. Major Business

Table 131. HYLUX Co., Ltd. Porous Ceramic Chucks Product and Services

Table 132. HYLUX Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. HYLUX Co., Ltd. Recent Developments/Updates

Table 134. HYLUX Co., Ltd. Competitive Strengths & Weaknesses

Table 135. TRI-N Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 136. TRI-N Co., Ltd. Major Business

Table 137. TRI-N Co., Ltd. Porous Ceramic Chucks Product and Services

Table 138. TRI-N Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. TRI-N Co., Ltd. Recent Developments/Updates

Table 140. TRI-N Co., Ltd. Competitive Strengths & Weaknesses

Table 141. Fine Ceramic New Material Co.,Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Fine Ceramic New Material Co.,Ltd. Major Business

Table 143. Fine Ceramic New Material Co.,Ltd. Porous Ceramic Chucks Product and Services

Table 144. Fine Ceramic New Material Co.,Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Fine Ceramic New Material Co.,Ltd. Recent Developments/Updates

Table 146. Fine Ceramic New Material Co.,Ltd. Competitive Strengths & Weaknesses

Table 147. Xiamen Innovacera Advanced Materials Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. Xiamen Innovacera Advanced Materials Co., Ltd. Major Business

Table 149. Xiamen Innovacera Advanced Materials Co., Ltd. Porous Ceramic Chucks Product and Services

Table 150. Xiamen Innovacera Advanced Materials Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Xiamen Innovacera Advanced Materials Co., Ltd. Recent Developments/Updates

Table 152. Xiamen Innovacera Advanced Materials Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Dongguan XY New Material Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 154. Dongguan XY New Material Co., Ltd. Major Business

Table 155. Dongguan XY New Material Co., Ltd. Porous Ceramic Chucks Product and Services

Table 156. Dongguan XY New Material Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Dongguan XY New Material Co., Ltd. Recent Developments/Updates

Table 158. Dongguan XY New Material Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Semicera Semiconductor Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. Semicera Semiconductor Technology Co., Ltd. Major Business

Table 161. Semicera Semiconductor Technology Co., Ltd. Porous Ceramic Chucks Product and Services

Table 162. Semicera Semiconductor Technology Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Semicera Semiconductor Technology Co., Ltd. Recent Developments/Updates

Table 164. Semicera Semiconductor Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 165. KINIK COMPANY Basic Information, Manufacturing Base and Competitors

Table 166. KINIK COMPANY Major Business

Table 167. KINIK COMPANY Porous Ceramic Chucks Product and Services

Table 168. KINIK COMPANY Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. KINIK COMPANY Recent Developments/Updates

Table 170. KINIK COMPANY Competitive Strengths & Weaknesses

Table 171. Touch-Down Technology Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 172. Touch-Down Technology Co., Ltd. Major Business

Table 173. Touch-Down Technology Co., Ltd. Porous Ceramic Chucks Product and Services

Table 174. Touch-Down Technology Co., Ltd. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Touch-Down Technology Co., Ltd. Recent Developments/Updates

Table 176. Touch-Down Technology Co., Ltd. Competitive Strengths & Weaknesses

Table 177. LONGYI PRECISION TECHNOLOGY CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 178. LONGYI PRECISION TECHNOLOGY CO., LTD. Major Business

Table 179. LONGYI PRECISION TECHNOLOGY CO., LTD. Porous Ceramic Chucks Product and Services

Table 180. LONGYI PRECISION TECHNOLOGY CO., LTD. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. LONGYI PRECISION TECHNOLOGY CO., LTD. Recent Developments/Updates

Table 182. LONGYI PRECISION TECHNOLOGY CO., LTD. Competitive Strengths & Weaknesses

Table 183. MACTECH CORPORATION Basic Information, Manufacturing Base and Competitors

Table 184. MACTECH CORPORATION Major Business

Table 185. MACTECH CORPORATION Porous Ceramic Chucks Product and Services

Table 186. MACTECH CORPORATION Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. MACTECH CORPORATION Recent Developments/Updates

Table 188. MACTECH CORPORATION Competitive Strengths & Weaknesses

- Table 189. PhotoMachining, Inc. Basic Information, Manufacturing Base and Competitors
- Table 190. PhotoMachining, Inc. Major Business
- Table 191. PhotoMachining, Inc. Porous Ceramic Chucks Product and Services
- Table 192. PhotoMachining, Inc. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 193. PhotoMachining, Inc. Recent Developments/Updates
- Table 194. PhotoMachining, Inc. Competitive Strengths & Weaknesses
- Table 195. FOUNTYL TECHNOLOGIES PTE. LTD. Basic Information, Manufacturing Base and Competitors
- Table 196. FOUNTYL TECHNOLOGIES PTE. LTD. Major Business
- Table 197. FOUNTYL TECHNOLOGIES PTE. LTD. Porous Ceramic Chucks Product and Services
- Table 198. FOUNTYL TECHNOLOGIES PTE. LTD. Porous Ceramic Chucks Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 199. FOUNTYL TECHNOLOGIES PTE. LTD. Recent Developments/Updates
- Table 200. FOUNTYL TECHNOLOGIES PTE. LTD. Competitive Strengths & Weaknesses
- Table 201. Global Key Players of Porous Ceramic Chucks Upstream (Raw Materials)
- Table 202. Global Porous Ceramic Chucks Typical Customers
- Table 203. Porous Ceramic Chucks Typical Distributors

List Of Figures

LIST OF FIGURES

- Figure 1. Porous Ceramic Chucks Picture
- Figure 2. World Porous Ceramic Chucks Production Value: 2021 & 2025 & 2032, (USD Million)
- Figure 3. World Porous Ceramic Chucks Production Value and Forecast (2021-2032) & (USD Million)
- Figure 4. World Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 5. World Porous Ceramic Chucks Average Price (2021-2032) & (US\$/Unit)
- Figure 6. World Porous Ceramic Chucks Production Value Market Share by Region (2021-2032)
- Figure 7. World Porous Ceramic Chucks Production Market Share by Region (2021-2032)
- Figure 8. North America Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 9. Europe Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 10. China Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 11. Japan Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 12. South Korea Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 13. China Taiwan Porous Ceramic Chucks Production (2021-2032) & (K Units)
- Figure 14. Porous Ceramic Chucks Market Drivers
- Figure 15. Factors Affecting Demand
- Figure 16. World Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 17. World Porous Ceramic Chucks Consumption Market Share by Region (2021-2032)
- Figure 18. United States Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 19. China Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 20. Europe Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 21. Japan Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 22. South Korea Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 23. ASEAN Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 24. India Porous Ceramic Chucks Consumption (2021-2032) & (K Units)
- Figure 25. Producer Shipments of Porous Ceramic Chucks by Manufacturer Revenue (\$MM) and Market Share (%): 2025
- Figure 26. Global Four-firm Concentration Ratios (CR4) for Porous Ceramic Chucks Markets in 2025
- Figure 27. Global Four-firm Concentration Ratios (CR8) for Porous Ceramic Chucks Markets in 2025

Figure 28. United States VS China: Porous Ceramic Chucks Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Porous Ceramic Chucks Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Porous Ceramic Chucks Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Porous Ceramic Chucks Production Market Share 2025

Figure 32. China Based Manufacturers Porous Ceramic Chucks Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Porous Ceramic Chucks Production Market Share 2025

Figure 34. World Porous Ceramic Chucks Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Porous Ceramic Chucks Production Value Market Share by Type in 2025

Figure 36. Al₂O₃ Chucks

Figure 37. AlN Chucks

Figure 38. SiC Chucks

Figure 39. World Porous Ceramic Chucks Production Market Share by Type (2021-2032)

Figure 40. World Porous Ceramic Chucks Production Value Market Share by Type (2021-2032)

Figure 41. World Porous Ceramic Chucks Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. World Porous Ceramic Chucks Production Value by Adsorption Scope, (USD Million), 2021 & 2025 & 2032

Figure 43. World Porous Ceramic Chucks Production Value Market Share by Adsorption Scope in 2025

Figure 44. Full Surface Adsorption

Figure 45. Partial Adsorption

Figure 46. World Porous Ceramic Chucks Production Market Share by Adsorption Scope (2021-2032)

Figure 47. World Porous Ceramic Chucks Production Value Market Share by Adsorption Scope (2021-2032)

Figure 48. World Porous Ceramic Chucks Average Price by Adsorption Scope (2021-2032) & (US\$/Unit)

Figure 49. World Porous Ceramic Chucks Production Value by Thermal Control Capability, (USD Million), 2021 & 2025 & 2032

Figure 50. World Porous Ceramic Chucks Production Value Market Share by Thermal Control Capability in 2025

Figure 51. Ambient Type

Figure 52. Thermal Control Type

Figure 53. World Porous Ceramic Chucks Production Market Share by Thermal Control Capability (2021-2032)

Figure 54. World Porous Ceramic Chucks Production Value Market Share by Thermal Control Capability (2021-2032)

Figure 55. World Porous Ceramic Chucks Average Price by Thermal Control Capability (2021-2032) & (US\$/Unit)

Figure 56. World Porous Ceramic Chucks Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Porous Ceramic Chucks Production Value Market Share by Application in 2025

Figure 58. Vacuum Chucks

Figure 59. Porous Ceramic Suction Stage

Figure 60. Porous Ceramic Suction Pads

Figure 61. World Porous Ceramic Chucks Production Market Share by Application (2021-2032)

Figure 62. World Porous Ceramic Chucks Production Value Market Share by Application (2021-2032)

Figure 63. World Porous Ceramic Chucks Average Price by Application (2021-2032) & (US\$/Unit)

Figure 64. Porous Ceramic Chucks Industry Chain

Figure 65. Porous Ceramic Chucks Procurement Model

Figure 66. Porous Ceramic Chucks Sales Model

Figure 67. Porous Ceramic Chucks Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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